

**MONTANA TEACHERS' RETIREMENT SYSTEM
INSTRUCTIONS AND CHECKLIST
OUT-OF-STATE TEACHING SERVICE**

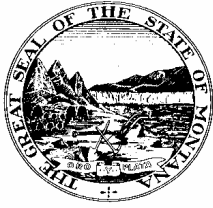
Creditable service may be purchased in the Montana Teachers' Retirement System (TRS) for public or private out-of-state teaching service performed within the United States and its territories or possessions that would have been acceptable if the service had been performed in Montana. A member may also be eligible under certain circumstances to qualify teaching service performed outside the United States.

A member joining the Montana TRS on or after July 1, 1973, may not be awarded more than five years of creditable service in any combination of out-of-state service, federal service, military service, private school service, extension service or service while on leave.

If a member contributed to a public retirement plan other than Social Security while performing the out-of-state service, they must receive a refund of their contributions from the other state before qualifying this service in Montana TRS, or rollover the out-of-state public retirement account. They may not purchase out-of-state service if they are receiving credit for the same service in another state. Research assistants and graduate student teaching service do not qualify under the Montana TRS.

Steps Required:

- You must apply by completing Part 1 of the Form 101 attached.
- Send this form to your Out-of-State employer for completion of Part 2.
- The Out-of-State employer must complete Part 2 and forward the form to the Out-Of-State public retirement system if the service was reported to a public retirement plan.
- The Out-Of-State public retirement system must complete Part 3 and send the form to the Montana TRS.
- The Montana TRS will determine eligibility to purchase the service, calculate the cost and advise you accordingly.
- The purchase of service must be completed prior to the Montana TRS processing the member's application for retirement.



**MONTANA
TEACHERS' RETIREMENT SYSTEM**

1500 E 6TH AVE
PO BOX 200139
HELENA MT 59620-0139
(406) 444-3134

**VERIFICATION OF SERVICE
OUT-OF-STATE**

TRS Office Use Only

(PLEASE TYPE OR PRINT LEGIBLY IN DARK INK.)

PART 1 – MEMBER'S INFORMATION:

(Name - Please Print)

____ - ____ - ____
(Date of Birth)

(Social Security Number)

(Home Mailing Address)

(City, State & Zip Code)

(____) - ____
(Area Code & Telephone Number)

(Maiden Name)

I hereby request and authorize the release of information requested on this form and any information necessary in establishing my claim for out-of-state service.

Member's Signature

PART 2 – TO BE COMPLETED BY AN OFFICIAL OF THE OUT-OF-STATE EMPLOYER:

USE ONE LINE FOR EACH SCHOOL YEAR

☐ Private Teaching Service
☐ Public Teaching Service

Term of Service During Each Fiscal Year
(Fiscal Year - July 1 to June 30)

Name of Employer

From **To**
Month Year Month Year

Full-Time

Part-Time

If Part-time,
Full-time
Equivalent

Number
of
Months
Served

Position/Title and Brief Description of Instructional Duties:

I certify to the Montana Teachers' Retirement System that according to the official records available to me, the applicant was employed in a public or private school, college or university of this state.

Authorized Signature of Employer

Printed Name and Official Title of Authorized Signature

Name of Employing Agency (school system, institution or University)

Mailing Address

Date Signed

Telephone Number
() -

City, State, Zip Code

NOTE: After completing this section, please forward to the state teachers' retirement system where the service was performed for completion of Part 3.
TRS Form 101 Rev 05/2005

PART 3 – TO BE COMPLETED BY OFFICIAL OF THE PUBLIC OUT-OF-STATE RETIREMENT SYSTEM (If applicable)

To: Teachers' Retirement System

From: Montana Teachers' Retirement System

Subject: Eligibility for Additional Credit

The person named on the front of this form is an active member of the Montana Teachers' Retirement System and wishes to establish credit for prior service with your system as verified by a previous employer. Montana law does not permit the purchase of additional public teaching service credit by members who are receiving a retirement benefit from another state or who have vested rights to a benefit to be paid at some date in the future. Therefore, to assist us in helping this member establish additional service credit, please answer the questions below that will indicate eligibility for retirement benefits from your system. Your assistance is greatly appreciated.

1. Do the years of service claimed on the reverse accurately reflect the service credit on record in your system? ☐ YES ☐ NO
2. Have the applicant's contributions and/or interest been withdrawn? ☐ YES ☐ NO
3. Does this member have credit in your system from another state?
If so, please indicate the state(s) and year(s) ☐ YES ☐ NO
4. Has this service been certified to another state? (Indicate below) ☐ YES ☐ NO

Remarks: _____

CERTIFICATION

I certify that the above information was taken from the official records of this system.

Authorized Signature of Official		Printed Name and Title of Authorized Official
Name of Agency (Retirement System)		Mailing Address
Date Signed - -	Telephone Number () -	City, State, Zip Code

NOTE: Please return this completed form to:

MONTANA TEACHERS' RETIREMENT SYSTEM
PO Box 200139
HELENA MT 59620-0139

*IN COMPLIANCE WITH THE AMERICANS WITH DISABILITIES ACT OF 1992,
ALTERNATIVE ACCESSIBLE FORMATS OF THIS DOCUMENT WILL BE PROVIDED UPON REQUEST*